



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**December 18, 2017**  
Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals  
FY 2017 annual targets  
FY 2017 actuals  
FY 2017 actuals as a percentage of annual targets  
FY 2017 actuals as a percentage of FY 2016 actuals  
FY 2018 actuals to date  
FY 2018 annual targets  
FY 2018 actuals as a percentage of FY 2018 annual targets

**The general target is 41.66% for FY 2018, July 1-November 30, 2017**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- Transportation
  - Number of complaints is historically low. Staff have been working hard to improve service reliability and focus on providing passengers with a positive experience.
  - Rides are 9.34% above target for the year at 51% due to the addition of the GNP commuter during the summer season and an 11% increase in Dial-A-Ride rides over this time last year.
  - Overall rides were up in both October and November from the same time period last year. (No GNP rides during those months.)
  - Excluding the GNP commuter, rides for the year are down 5% from this time last year.
  - Fixed route rides, without the addition of the GNP commuter, lag 24% due to a substantial decrease in Kalispell city bus rides (mostly on the PM route).
  - Current planning efforts are focused on restructuring Kalispell routes.
- Benefits counseling hours are significantly above target due to Medicare Open Enrollment which ran October 15-December 7.

## **AOA Administration**

### ***Budget and Contracts***

- We did not receive a decrease in our base state funding this biennium as part of the recent cuts to DPHHS. However, we are waiting to hear if our provider rate increase will remain intact.
- We completed and submitted a revised final financial report to DPHHS to include the missing revenue we recently received.
- We have been awarded a new one-year sustainability Benefits Enrollment Center grant from the National Council on Aging for approximately \$34,500. The grant period is January 1-December 31, 2018. Our current BEC grant expires December 31, 2017. We implement the BEC program in partnership with the Area VI Agency on Aging.
- The Veterans Administration has approved us to begin providing the Veteran-Directed Home and Community-based Services (VDHCBS) program in Flathead County in partnership with the Area VI Agency on Aging. We are in the process of completing final documentation, including a service agreement with Area VI, which will be available for Commissioner review/approval shortly. Initially, Area VI staff will provide VDHCBS services to eligible Flathead County veterans and pay us a monthly fee per enrolled veteran. We will take over service provision at some point in the future when there are enough veterans enrolled to support staff and operational costs.

### ***State/Federal/Legislative Issues***

- Lisa participated in an M4A conference call on 12/7/2017. The next quarterly meeting will be held January 24-25 in Helena.
- Federally, we continue to engage in advocacy efforts regarding health care, Medicare and Medicaid, and funding for aging services in the FY 2018 budget. We are also monitoring the potential effects of tax reform legislation on services and programs for older adults.

### ***Building***

- The following punch list items related to AOA have not been resolved or have not been repaired to our satisfaction: carpet repair in the AOA suite (in progress), repair or replacement of the small kitchen freezer, and repair or replacement of one outlet in the kitchen used for a stand-alone refrigerator.

### ***AOA Advisory Council***

- The next Advisory Council meeting will be January 11, 2018. The Council will then begin meeting every other month.

### ***Other***

- We had hoped to complete our new Continuity of Operations Plan (COOP) by the end of December, but are now planning on end of February or March.

## **Outreach/Education/Media**

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 11/6/17, monthly KGEZ interview, 11,000
- 11/11/17, information table at the Veterans' Summit at FVCC, 70 visitors
- 11/18/17, booth at KRMC Senior Safety Day, 200 visitors
- 11/19/17, presentation at Epworth Methodist/Stephen's Ministry, 12 attendees
- 11/29/17, presentation to KRMC Stroke Support Group, 17 participants

## **Eagle Transit**

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant
    - David Kack, transit consultant and Director of the Small Urban, Rural and Tribal Center on Mobility (SURTCOM) at the Western Transportation Institute, Montana State University, met with Eagle Transit staff on December 12<sup>th</sup> to review routes and services and develop alternatives. He also met on December 13<sup>th</sup> with the Planning Committee.
    - The next Planning Committee meeting is set for 2/1/2018.
  - FY 2019 Transportation Coordination Plan, 5311 Application and Capital Request
    - MDT notified us of our funding allocation for FY 19. We will receive \$705,708 in federal funding and \$75,556 in state TransADE funding (to help support transit services for older adults and people with disabilities), for a total of \$781,264. This is an increase of \$65,647 from FY 2018, which will primarily be used to cover increased personnel costs.
    - The annual public input meeting was held on December 6<sup>th</sup> from 4:00-6:00 pm in the South Campus large conference room. Twenty-three people participated.
    - Invitations to the public input meeting and Transportation Advisory Committee meetings were sent to local private transportation providers per federal requirements.
  - The second quarter program and financial reports are due January 30, 2018.
- Outreach/Education/Media:
  - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
  - Promotion of Public Input meeting:
    - Flier sent to all Independent Living Services clients and Meals on Wheels recipients
    - Email invitations to the public input meeting were sent to private providers, city staff and 92 stakeholders.
- Operations:
  - We are in the process of obtaining the onboard cameras approved as part of our FY 2017 capital request.
  - We anticipate receiving shortly a new 27 passenger bus shortly approved as part of our FY 2017 capital request.
  - Installation of bus stop signs is on hold pending the completion of the 5-Year Development Plan.
  - Staff met with Chandler Communications regarding advertising wraps for existing and new vehicles.
- Transportation Advisory Committee (TAC)
  - The next meeting will be January 4<sup>th</sup> to discuss the FY 2019 Transportation Coordination Plan, followed by a meeting on February 1<sup>st</sup> to review and vote on the final TCP, the 5311 application and the capital request.
  - Commissioners appointed two new members, Mike Merchant and Kyle Waterman.
- Glacier National Park
  - MDT and the National Park Service will release ownership of 6 Optima buses to Flathead County at the end of December. We are exploring options for sale/disposal.

### **Nutrition**

- We're averaging about 90 meals per day in the AOA dining room, with multiple days over 100.
- Our annual Christmas meal will be served December 22<sup>nd</sup>.

### **I & R/Assistance/Ombudsman**

- Medicare Open Enrollment ended December 7, 2017.
- An AOA volunteer recently offered a diabetes management workshop series at the South Campus.
- The Age-Friendly Flathead Steering Committee will meet December 21<sup>st</sup>. Our strategic planning meeting is scheduled for February 17, 2018.
  - Occupational Therapy interns from Pacific University produced a checklist local businesses can use to make low-cost accommodations for older customers and those with dementia.

### **RSVP**

- Grant update: The final FFR is due. We still cannot access the federal online system.

### **Senior Mobile Home Repair**

- The Advisory Board met on 12/12/17 but minutes are not yet available.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- We are in the process of updating all service agreements with area senior centers. AOA have staff have met with the Kalispell Senior Center and Bigfork Community Center boards. Meetings with the Whitefish and North Valley boards are scheduled for January.
- We are participating in a joint project with Agape Home Care and area senior centers to provide 130 smoke detectors to area seniors who do not have them.
- The Kalispell Senior Center's annual "It's a Wrap" fundraiser is going on until Christmas Eve at Kalispell Center Mall.
- The Bigfork Community Center recently offered a speaker series entitled "Celebrating History" and a diabetes management workshop series. They also offer a bi-monthly caregiver support group. Women Who Wine donated \$1600 to the Center.
- The Whitefish Community Center holds a "birthday party" on the 15<sup>th</sup> of each month to honor members' birthdays. They also have a Newcomers' Club that hosts a monthly luncheon and a variety of activities at the Center and out and about.



# December 2017 Report: Performance Measures Tables -November 2017 stats (FY 2018)

41.66%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016	Nov	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%	not yet available	78	78	233	33%
# Receiving Meals on Wheels	471	450	470	104%	100%	22	260	282	465	61%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%	144	788	932	1,000	93%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%	15	244	259	500	52%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%	91%	91%	91%	88%	103%
Per Meal Cost of Nutrition Services	\$6.30	\$6.50	\$6.89	106%	109%	\$5.70	\$5.52	\$5.70	\$6.75	84%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL=96%	100%	100%	N/A	0%	N/A	95%	100%
Maximum annual number of transportation complaints	27	36	30	83%	111%	0	3	3	36	8%
WORKLOAD INDICATOR	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 17 as % FY 16		Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
<b>Outreach/Education/Media</b>						Nov				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%	5	51	56	120	47%
<b>Nutrition</b>						Nov				
Total Meals	78,541	82,000	82,428	101%	105%	6,789	27,208	33,997	79,000	43%
MOW	49,283		49,695	N/A	N/A	3,994	15,783	19,777		
Congregate	29,258		32,733	N/A	N/A	2,795	11,425	14,220		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%	169	820	989	1,550	64%
<b>Transportation</b>						Nov				
Total Ride Count	91,196	94,000	85,305	91%	94%	7,284	38,334	45,618	90,000	51%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%	2,654	10,302	12,956	30,000	43%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%	4,630	28,032	32,662	60,000	54%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%	3	10	13	15	87%
<b>Information and Referral/Assistance</b>						Nov				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%	1,840	6,074	7,914	18,000	44%
<b>Independent Living</b>			38%			Oct				18%
Homemaker Units of Service	1,616	3,333	784	24%	49%	not yet available	322	322	2,500	13%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%	not yet available	340	340	1,739	20%
Respite Units of Service	2,600	3,315	992	30%	38%	not yet available	478	478	2,468	19%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%	not yet available	327	327	1,353	24%
Personal Care Units of Service	1,150	465	358	77%	31%	not yet available	60	60	435	14%
<b>Benefits Counseling</b>						Nov				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A	109	163	272	450	60%
<b>Ombudsman</b>						Nov				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%	70	428	498	1,100	45%